

# **Recreation Delivery System LERN Program Management Institute**

**Fort Monmouth, New Jersey  
February 2-5, 1999**



This is a publication of the Learning Resources Network (LERN), the leading international organization in class programming, providing information and consulting expertise to organizations offering classes for adults.

Founded in 1974, LERN provides "Information That Works"® to a variety of institutions involved in class programming, including colleges and universities, public schools, community colleges, recreation departments, hospitals, independent and community groups.

LERN offers publications, newsletters, seminars, conferences, in-house programs, individual consulting, and membership services.

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## ***"Information That Works"***

**1550 Hayes Drive, Manhattan, KS 66502**

**1-800-678-5376 • Fax: 1-888-234-8633**

RDS Program Management Institute Participant:

Welcome to LERN's RDS Program Management Institute! Over the next four days, you will receive the most current principles, strategies, techniques and approaches for developing, marketing and managing recreation programs. Our goal is to provide this information in a format that will enhance its usability for you in implementing recreation programs and designing your Recreation Delivery System.

This manual has been designed to provide you with a summary of the information we will be sharing during the next four days. In addition, you have received other highly useful LERN publications that go well beyond summary of the many topics to be covered during the four days. These publications will be invaluable resources to you in refreshing following the Institute and in implementing what you learn.

Both of us are long-time professionals in lifelong learning and on the cutting edge in the application of the latest in recreation program development, marketing and management strategies. While we are confident that you can sit quietly for four days and receive and absorb tons of new, useful information, you will be better served if you take an active part in the program. Share your insights and experiences; ask questions and seek clarification during the sessions; and take advantage of the opportunity and willingness of both of us to schedule post-session, one-on-one time with you to deal with your specific issues/concerns or go more deeply into a particular subject.

Thank you for attending this Institute. We look forward to working with and getting to know you over the course of the next four days.

In learning,

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# About LERN

The Learning Resources Network (LERN) is the leading association in lifelong learning programming, offering information and consulting expertise to providers of lifelong learning programs.

Begun in 1974, LERN serves more than 9,000 professionals every year. LERN provides practical, how-to information on marketing, finances, management, and product development. It is information not available anywhere else. Our slogan is "*Information That Works!*"\*

Services include publications; newsletters; seminars, conferences, Institutes and in-house training programs; and consulting to members and others. LERN's Internet Information Services include more than 450 reports on the management and marketing of continuing education programming; on-line discussions

with colleagues from around the world; news; surveys, and more.

LERN serves a wide variety of institutions, including state universities, four-year colleges, colleges within universities, private colleges, community colleges, technical colleges, public schools, recreation departments, and associations.

Every year we research and disseminate the most advanced and sophisticated information. Recent work has included: profit margins—what makes money; redesigning of job descriptions; the information specialist position; an action strategy for internal marketing; developing a product mix for your segments; why you need seven market segments; the shift from products to markets; and how to measure staff time.

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## About the Presenters

**Greg Marsello** is President of Learning Connection in Providence, Rhode Island. Marsello started Learning Connection in 1980. With more than 10,000 registrations a year, it is now the largest provider of avocational and leisure learning classes in the state. He has written and spoken on the topic of target marketing, and his program's brochure is consistently one of the best in the nation.

His work won an international award for reengineering from LERN in 1995. He is a co-founder of LERN, was its Board Chairperson for 12 years, and is now LERN's Vice President for Organizational Development.

**William A. Draves, CAE**, President of LERN, is America's foremost authority on lifelong learning and continuing education. Over the past 20 years, he has been the most quoted expert on lifelong learning and continuing education by the nation's media.

Draves is author of *Improving Financial Performance*, *Marketing in the 1990s*, *Energizing the Learning Environment*, and *How To Teach Adults*, the most widely read book on adult learning.

He has a master's degree in adult education from The George Washington University in Washington, D.C., and is a past president of the Coalition of Lifelong Learning Organizations.



# **Needs Assessment**





# Needs Assessment

**Needs Assessment — “an ongoing process of discovering what your program’s participants want in terms of activities and services.”**

## **What Needs Assessment Is NOT**

- It’s not expensive.
- It’s not a one-time study.
- It’s not more work — it replaces wasted staff time and its results maximize profits and services.
- It’s not a general overview — it is very specific.
- It’s not the same as environmental scanning, though it can be used in environmental scanning.
- It’s not something you contract out; it is too important; it is something you and your staff do.

## **What Needs Assessment IS**

- It is customer oriented.
- It is low cost.
- It involves some or all of your staff in some way.
- It is ongoing.
- It does not separate ‘needs’ from ‘wants’.
- It understands that the participants or customers know more about their needs than any other entity.
- It is practical.
- It costs less than not doing needs assessments.

# Needs Assessment Points

1. Market Potential is the Total Number of Possible Participants and Market Share <sup>← can register</sup> → is the Total Number of Those People <sup>what you have</sup> You Have Enrolled
2. Four Components of One-Year Marketing Plan:
  - ① Staffing Responsibilities/② Registration Targets for All Major Activities/③ A Detail of Promotion Efforts/④ Marketing Budget by Division, Major Activity or Other Major Break Downs
3. Best Survey Techniques: #1 Mail, #2 Focus Groups and #3 Telephone
4. Close Ended Questions Work Better Than Open Ended Questions

*6 months  
prior to  
program*

## One-Year Marketing Plan Report

- A. Executive Summary *-GOALS*
- B. Annual Objectives  
(tied to budget)
- C. Unit/Division Objectives
  - 1. # events
  - 2. new vs. old
  - 3. kinds/market niches
- D. By Session
- E. Promotion Strategy
- F. Timeline
- G. Who



# Survey

- Phone or mail, but mail most successful

1. Stars

2. 200+

3. Envelope/post card

4. Name/explanation/one question/thanks

5. Prepaid

# Survey

Dear Learning Opportunities participant:


c3llt

This fall, we will be increasing the number of computer courses in our catalog. Please select 2 courses you'd like to see us offer by checking the box next to the name of the course.

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Creative Computing | <input type="checkbox"/> Computer Basics    | <input type="checkbox"/> Savvy Computer Buying |
| <input type="checkbox"/> Build Your Own PC  | <input type="checkbox"/> Beginning Internet | <input type="checkbox"/> Advanced Internet     |

Please return  
by April 1, 1998.


Thank you!




**BUSINESS REPLY MAIL**  
FIRST-CLASS MAIL PERMIT NO. 23 ANYTOWN USA  
POSTAGE WILL BE PAID BY ADDRESSEE

Learning Opportunities  
1115 70th Street  
Anytown, USA 12345-6789

NO POSTAGE  
NECESSARY  
IF MAILED  
IN THE  
UNITED STATES





# How many responses do you need?

To find the range of error of your survey, use this formula, according to statistics professor John Boyer of Kansas State University:

$$\pm 2 \sqrt{\frac{p(1-p)}{N}}$$

p = response ratio

N = number of surveys returned

SURVEYS RETURNED	RESPONSE RATIO	ERROR RANGE	POSSIBLE RESPONSE
400	Any	5%	
200	80 - 20	6%	74 - 26
	75 - 25	6%	69 - 31
	70 - 30	6.4%	63 - 37
	65 - 35	6.8%	58 - 42
	60 - 40	7%	53 - 47
100	75 - 25	8.6%	66 - 34
	70 - 30	9%	61 - 39
	65 - 35	9.5%	55 - 45
	60 - 40	10%	50 - 50
50	75 - 25	12%	63 - 37
	70 - 30	13%	57 - 43
	65 - 35	13.5%	51 - 49
	60 - 40	14%	46 - 54
25	80 - 20	16%	64 - 36
	75 - 25	17%	58 - 42
	70 - 30	18%	50 - 50

# Demographic Profile

## RESIDENCE

Street address

---

---

City, State, ZIP

---

---

## SEX

Female \_\_\_\_\_

Male \_\_\_\_\_

## AGE

under 5 \_\_\_\_\_

5-7 \_\_\_\_\_

8-11 \_\_\_\_\_

12-15 \_\_\_\_\_

16-18 \_\_\_\_\_

19-24 \_\_\_\_\_

25-34 \_\_\_\_\_

35-44 \_\_\_\_\_

45-54 \_\_\_\_\_

55-69 \_\_\_\_\_

over 70 \_\_\_\_\_

## EDUCATION

Attended high school \_\_\_\_\_

High school graduate \_\_\_\_\_

Attended college \_\_\_\_\_

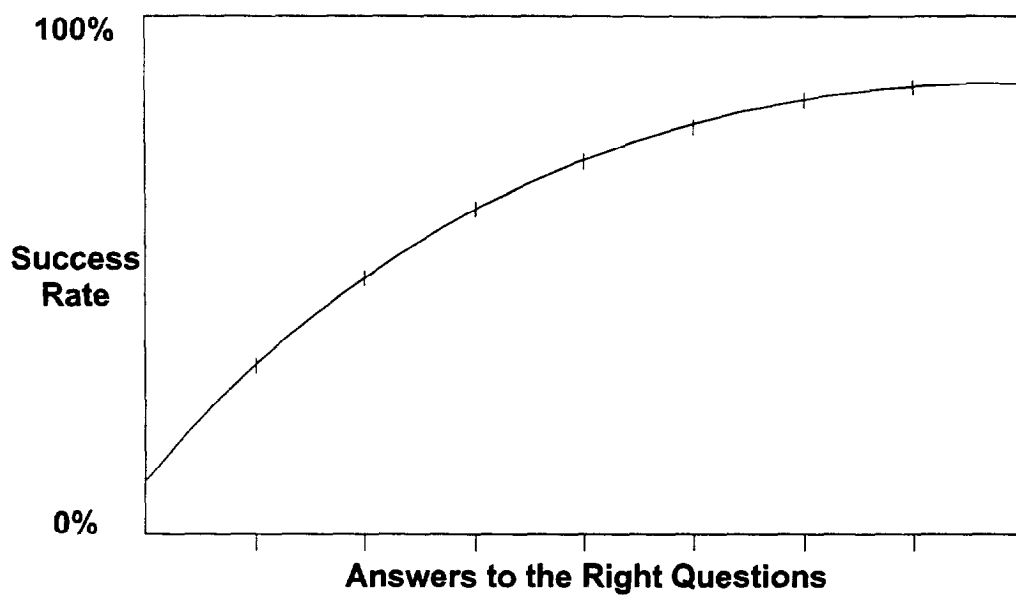
College graduate \_\_\_\_\_

Post graduate \_\_\_\_\_

# Strategies for New Program Development

- Determine Objectives *#*
- Develop a Product Mix for Market Segments *← Brause*
- 0.00* ■ Analyze Program Performance: <sup>(1)</sup> Operating Margin, <sup>(2)</sup> Income, <sup>(3)</sup> Quality, <sup>(4)</sup> Registrations
- Cut the dogs!!
- Vertical and Horizontal Expansion
- Ask the Right Questions
- Five-Step Process
  1. Get ALL the alternatives
  2. Ask what to eliminate
  3. Survey for the top vote getter
  4. Model the numbers
  5. Now go with your hunch

# New Program Success Chart



This chart illustrates how LERN's Ten "Right" Questions can dramatically increase the success rate for your organization. At the left, without knowing much about what your audience wants, your chances for success with "trial and error" are very low. At the right, after you ask your audience LERN's Ten "Right" Questions, your chances of success go up substantially.

# The Ten Right Questions of Success

1. Is this the right audience?
2. Is this the right subject area?
3. Is this the right topic?
4. Is this the right title?
5. Is this the right format?
6. Is this the right place?
7. Is this the right time?
8. Is this the right instructor?
9. Is this the right price?
10. Is this the right promotion?

# Financial Strategy

## Total Income

Budget projection compared to actual

Star exceeds budget

Cash cow meets budget

Problem child is 40-99% of budget

Dog is less than 40% of budget

## Operating Margin

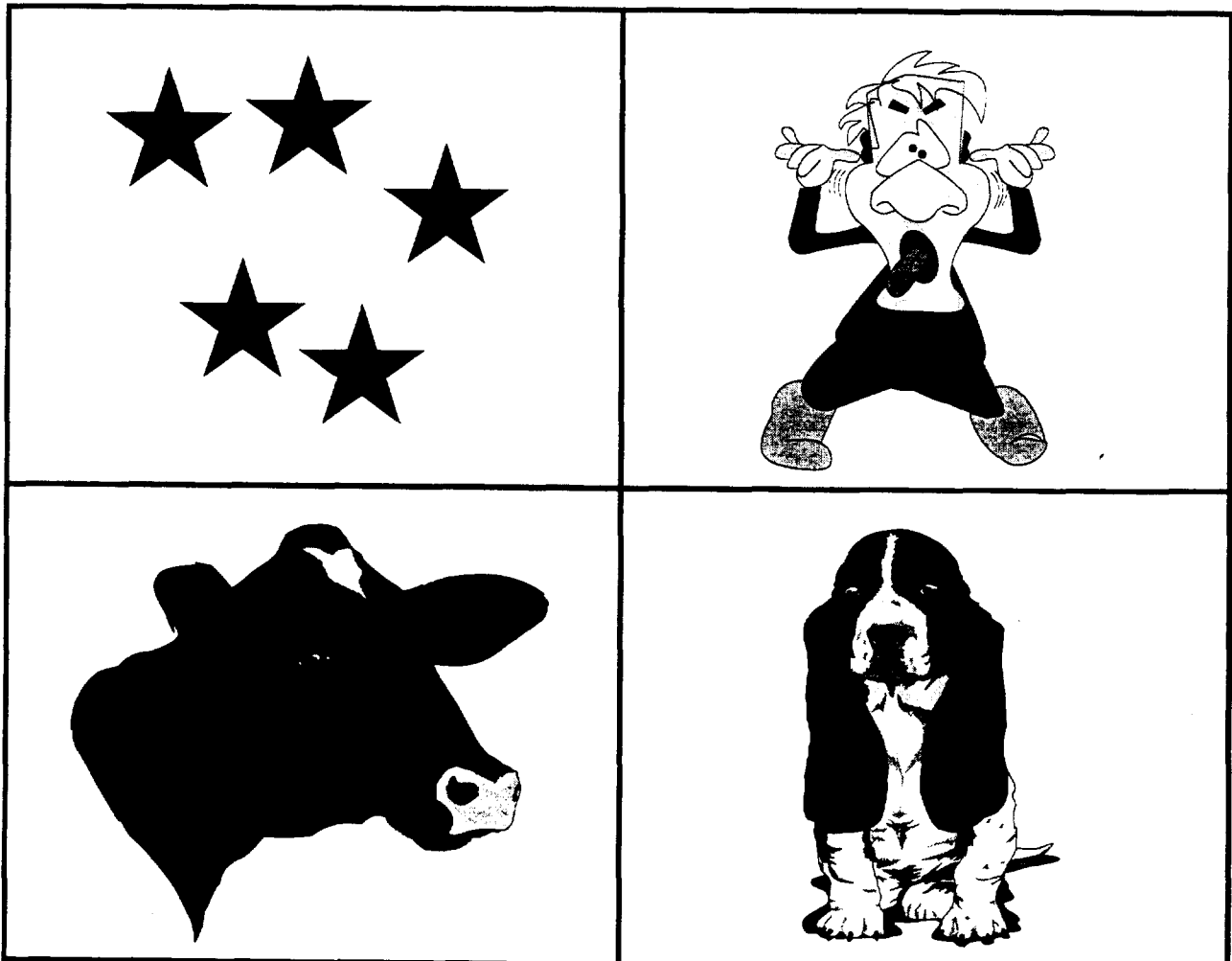
Income – direct costs = operating margin

Star exceeds 40% operating margin

Cash cow meets 40% operating margin

Problem child operating margin is 20-39%

Dog operating margin is less than 20%





# Product Strategy

## Registrations

Total program or section average

Star exceeds average

Cash cow meets average

Problem child is 50-99% of average

Dog is less than 50% of average

## Quality

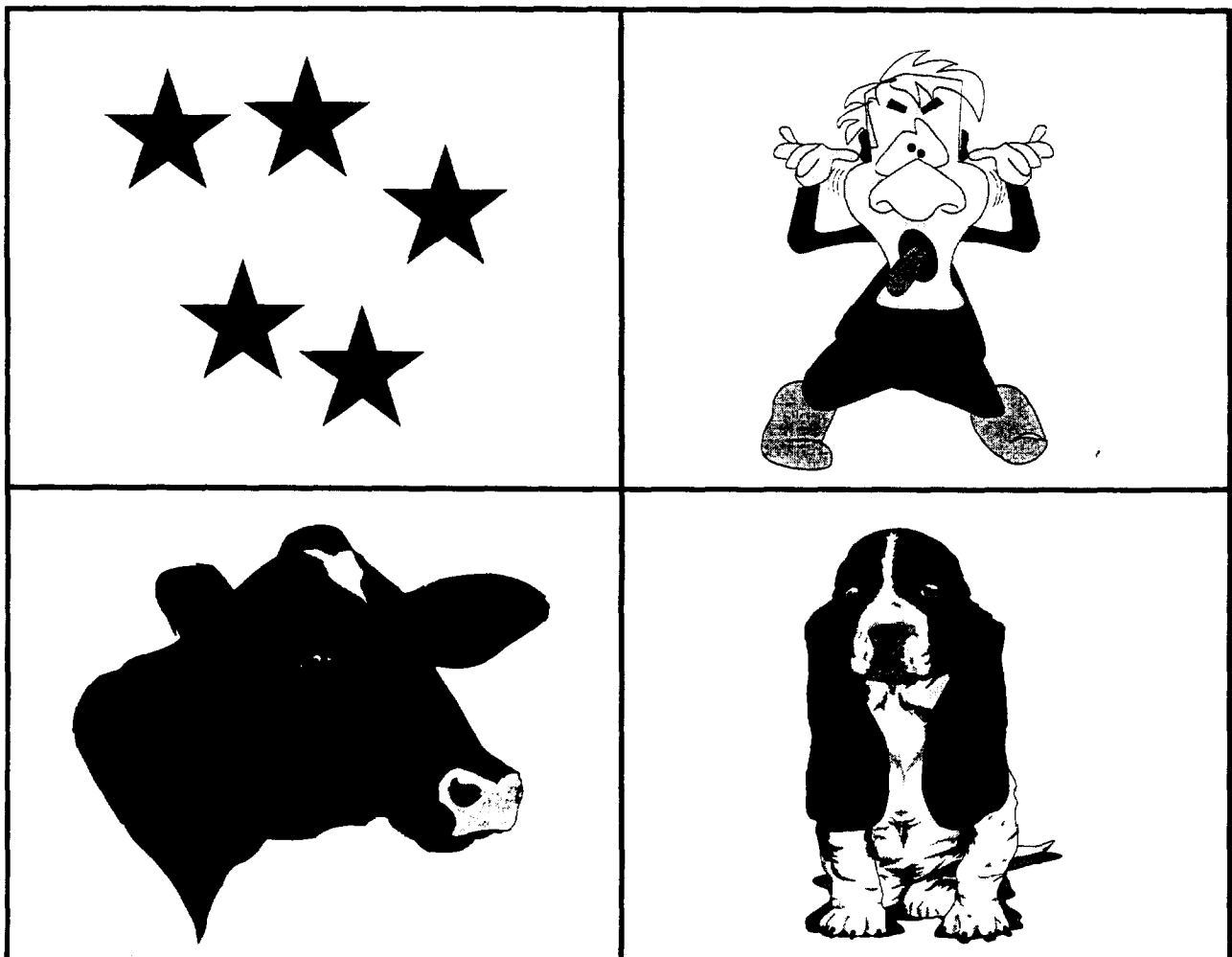
Rating products 1-5

Star 4-5

Cash cow 3.5-4

Problem child 3-3.5

Dog less than 3



# Customer Strategy

## *Where to Expand*

	Current Customers	New Customers
Existing Products	<p>This is what you have now. You have existing programs for existing participants.</p>	<p>Here's a good way to expand. Take an existing program to a new audience.</p>
New Products	<p>Here's a good way to expand. Create a new program for your existing participants.</p>	<p>Here's a poor and risky choice. It is extremely difficult to succeed by creating a new program for a new audience. Stay away from this option.</p> <p><del>NO</del></p>

# Competition Record Sheet

Program: Learning for Everyone

Sponsor: Educational University

Enrollments/Registrations: 1993 10K 1994 12K 1995 15K 1996 16K 1997 20K

Events: Type & #: Business 20%, Personal Growth 15%,

Practical 25%, Recreation 20%, Computers 20%

Gross Income: 20,000 x \$50 = \$1,000,000

Average Fee: \$50

Percent of Existing Market: 20,000 / 1,000,000 = 2%

Participant Profile/Characteristics: 30 years and older; mostly women;

from immediate area

Organizational Strengths: Great brochure; event space;

good newspaper publicity

Organizational Weaknesses: Presenters/instructors; customer service

Uniqueness, if any: Sponsorship with local computer store

Position/Image in Market: Not friendly; not enough new computers

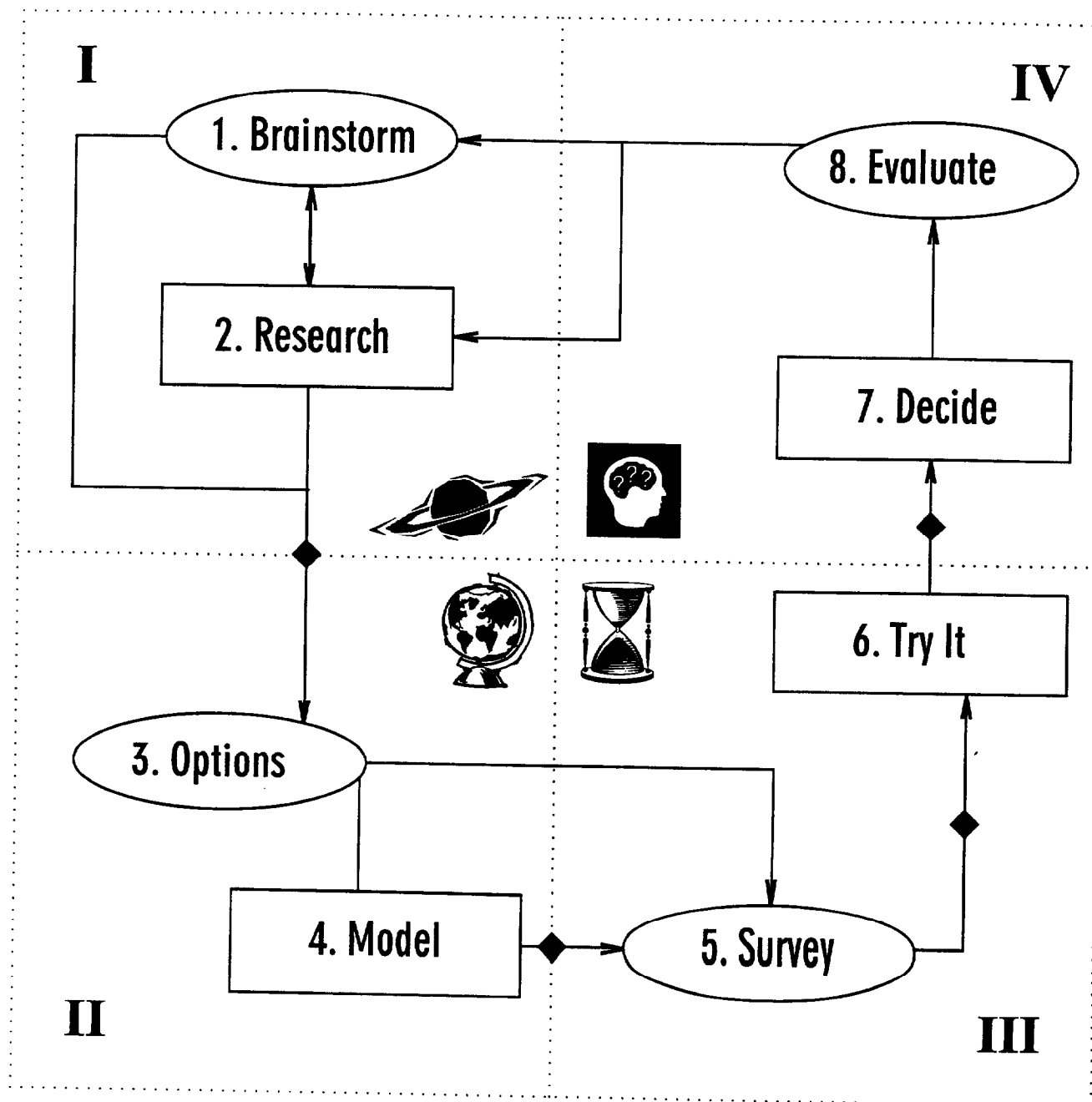
# DIVISIONS

## SEGMENTS

	Executives	Secretaries	Children	Older Adults
One night	25%	10%	2%	3%
Trips/Tours	5%	5%	20%	15%
8 Weeks	30%	10%	3%	2%
Weekend	15%	5%	40%	15%
Day seminars	25%	70%	0%	5%
Afternoon	0%	0%	30%	20%
Morning	0%	0%	5%	40%



# 8-STEP NEEDS ASSESSMENT MODEL



© LERN



# Why Needs Assessment Has Become So Important

Professionals with lifelong learning programs are increasingly becoming interested in needs assessment — finding out what their participants, customers, and members want. There is a good and significant reason why more professionals are focussing on needs assessment these days.

The world of lifelong learning has been revised totally in the last few years. No longer can programs offer products — courses, seminars, events, classes, etc. — and expect that people will come.

The learner is now determining what she or he wants to learn, and when, and how. And with increasing market segmentation, there is no one audience out there for our programs. There are many audiences. Each audience may want something different.

The job of professionals in lifelong learning has changed. It used to be to offer educational activities and to get people to come to those programs. Today the job is to determine what learners want and then to create those educational activities around the needs of the audience being served.

With that fundamental shift, needs assessments have moved to the top of the list of priorities and job function for more and more programmers.

Another reason needs assessment has become more important today is that the key to programming success is no longer to find a program that has been popular or successful elsewhere and to offer it.

## Needs Assessment Now a Process

With all the market segmentation, competition and changing learner needs in our industry, there are few if any easy, standard “answers” to programming success. Instead, the answers are unique to your individual program and to your audience. Thus, there are no longer any blanket answers useful for all programs. Instead, there is a process by which you can determine what works for your audience.

Historically, most professionals in lifelong learning just tried a new activity, course, or event. “You never know what works” has been

one long cherished view and common phrase. “Just go on your hunch” has been another.

In the last few years professionals have tried to enhance new program success by surveying their participants and even nonparticipants. While surveying participants is an important part of the process, it is only ONE stage in the process of good needs assessment.

## Costs and Risks Have Increased

Another reason for more needs assessments today is that the risks have increased for offering new activities, and the costs for failing with new programs is growing. Professionals now understand the concept of lifetime value, and that success with a new audience or program can result in high income dollars over a three year period. Failing initially can mean losing those high income dollars totally.

Staff time has also become more valuable. With high dollar programs, it is now more cost effective to do a good needs assessment and succeed with a new program than to just try it and risk the high cost of failure.

## The New LERN Model

The 8-Step model has been developed over the past fifteen years by the staff at LERN. The development effort has involved extensive research into the literature of needs assessments and market research. It has involved working with programs all over the world on each stage of the 8-Stage model. The 8-Stage model has been used by LERN over the last decade and resulted in a very high success rate, thus demonstrating its value and practicality. And it has been refined and improved upon over the past five years following numerous seminars, conference presentations and publications.

The 8-Stage model is a practical model designed for immediate and daily use by practitioners in lifelong learning programs. It is not a theoretical model, nor one applicable to only one kind of programming or institutional setting.

## The 8 Steps

The 8 steps of the needs assessment model are:

1. **Brainstorming.** Gathering 10-20 ideas from all sources, including staff and participants. No idea is a bad idea. It is a critical first step without which the other stages cannot succeed.
2. **Research.** At the same time you are doing brainstorming, you are also doing research. This includes data and numbers on your current participants and activities, analyzing the competition, and reviewing the total environment.
3. **Selecting Options.** From all the ideas brainstormed and researched, you narrow your choices down to 2-3 options. A small group such as an advisory board, focus group or leadership council is very helpful in this process.
4. **Modelling.** A critical stage is working out a potential new program on paper. Without putting some numbers to paper, such as response rate, cost of promotion and production, anticipated participants, and so on, it is difficult if not impossible to succeed.
5. **Survey.** At this stage, you survey a section of your participants to gain additional and final information on what will make the program a success.
6. **Try it.** After going through five stages, you try the new idea by offering it to your audience and giving it your best promotional shot. If you have spent enough time and thought on the first five stages, this effort should provide evidence that the new program will be successful over the long term.

7. **Decide.** Often times not enough energy and thought is put into analyzing the results of the first effort. Sometimes new programs are killed when they actually have demonstrated long term success, even though the first program may not have made money.
8. **Evaluate.** Every program needs ongoing evaluation to improve it. Certainly all new programs will need to be refined and tuned to improve the quality and the profitability.

## Symbols

The 8 steps fall into four types of inquiry. They are represented by:

**Saturn.** The planet Saturn represents the first kind of inquiry which takes place during the Brainstorming and Researching stages. It is "Explore the universe." Explore everything. Get out of the box.

**World.** The globe or world symbolizes the second kind of inquiry which takes place during the Options and Modelling stages. It is "Get down to earth." Get realistic. Is the idea feasible? Is the time right?

**Hour Glass.** The hour glass symbolizes the third kind of inquiry which takes place during the Survey and Try It stages. It is "Time to get going." This is the time when you have to get your idea out of the blocks and into action. No time to wait now.

**Brain.** The brain or head symbolizes the fourth kind of inquiry which takes place during the Decide and Evaluate stages. It is "analyze and think." This is the time when a smart professional will analyze the new program to date and make some decisions and improve upon the new effort's initial success.

## Quadrants

The 8-Step needs assessment model is also divided up into four time quadrants. The quadrants represent the timeline for these stages of the needs assessment process.

Too often professionals have tried to conduct needs assessment in a hurry, or very near the start of a new event or course. The needs assessment process takes considerably longer time than that in order to enhance your chances of success.

**Quadrant I.** This quadrant (Brainstorming and Research) needs to be done far in advance. For major new initiatives and high dollar programs this is 24 months to 36 months (2-3 years) before a big new program is Tried (Stage 6).

**Quadrant II.** This quadrant (Options and Modelling) needs to be done in advance of surveys and testing, say 12 to 24 months for a big new program.

**Quadrant III.** This quadrant (Surveys and Try It) is the here and now, from 6 months to 0 months before testing or trying a new program.

**Quadrant IV.** This quadrant (Decide and Evaluate) comes after the first effort, test, or first time offering the new program. From 0 months to 6 months after the first offering.

## Other Explanations

**Ovals.** Ovals means the stage involves both a staff person and a wider group beyond the organization, like participants, focus group, advisory board, friends and family.

**Rectangles.** Rectangles mean the stage is primarily involving staff only.

**Diamonds.** The diamonds between some of the stages mean "decision" needs to be made. Usually that is a decision to proceed, or narrow down.

**Arrows.** Arrows move the process forward. But some arrows indicate that two stages are done at the same time, or that the whole process starts over again after the Evaluate stage.



# **Program Analysis**





# Program Analysis

## Key Program Analysis Points

1. Four Most Important Statistics in Predicting Enrollments
  - A. Existing Class/Event Cancellation Rate
  - B. Enrollments in Your Last Session/Event  
*also look at a year ago.*
  - C. Average Participants per Class/Event
  - D. Number of Courses/Events Being Offered
  
2. Analysis Points
  - A. Go/No-Go Point: Cover Production Costs
  - B. Break-Even Point: Cover Direct Costs  
(Promotion/Production)
  - C. Budget Point: Reaching Projected Income Goal

# Predicting Enrollments Example

A. Courses/Events

250

80%

X

B. Cancellation Rate

180% - 20%

CLASSES 200

C. Average Participants  
per Class/Event

X 10

D. Enrollments

2,000

280%

12/51

# Analysis Points

Projected Income \$2,000

Promotion Cost \$250

Production Cost \$750

Event Fee \$50

1000

Go/No-Go Point 15

Break-Even Point 20

Budget Point 40 ← CASH COW  
meet budget goal

# Evaluation and Continuous Improvement

1. Information Specialist Report
2. Go/No-Go Report
3. Distribution Tracking Report
4. Evaluation Report
5. Promotion Analysis Form
6. Cost Analysis Form
7. Half-Life Report
8. Demographic Information Report



**LERN** *"Information That Works"®*

## Information Specialist Daily Report

### CALLS

- |                                   |         |
|-----------------------------------|---------|
| 1) Total Calls for ____/____/____ | _____   |
| 2) Total Calls Into Voice-Mail    | _____   |
| A) Contact Made                   | _____ % |
| B) Contact Not Made               | _____ % |
| 3) Hours on the Phone             | _____   |

### REASON FOR CALL

- |                      |       |         |
|----------------------|-------|---------|
| 1) Sale              | _____ | _____ % |
| 2) Inquiry           | _____ | _____ % |
| 3) Pass On           | _____ | _____ % |
| 4) Question          | _____ | _____ % |
| 5) Complaint/Problem | _____ | _____ % |

### INQUIRY

- |                           |       |         |
|---------------------------|-------|---------|
| 1) Course                 | _____ | _____ % |
| 2) Brochure               | _____ | _____ % |
| 3) Membership             | _____ | _____ % |
| 4) Conference/Seminar     | _____ | _____ % |
| 5) Product                | _____ | _____ % |
| 7) Instructor Information | _____ | _____ % |

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## Course Go/No-Go Report

Course/Event #	1	2
Course/Event Name	Fishing	Sailing
Start Date	7/15	7/25
Course/Event Fee	\$25	\$50
Course/Event Limit	10	6
Course/Event Hours	6	10
Instructor Cost	\$10/hr.	25%
Promotion Cost	\$50	\$50
Go Point	3	1
Break-Even	5	2
Goal	10	4
Actual	2	6
Cancel	YES	NO

**Fishing:** The Fishing course is canceled because the number of participants is less than the Go Point. If this course had been run, the teacher would have been paid \$60 but the registrations collected would have only been \$50.

**Sailing:** The Sailing course runs and actually is very profitable. The total registration income is \$300. The teacher is paid 25 percent or \$75. The \$75 added to the promotion cost of \$50 equals \$125, making 42 the expense percentage and thus the margin 58 percent.

## Method of Distribution Report

			%	Cost	%
A) #12	Customer Mailing List	20,000	20	\$5,000	23
B) #11	Newspaper A Insert	15,000	15	\$3,000	14
C) #10	Newspaper B Insert	10,000	10	\$2,500	11
D) #9	Street Distribution	25,000	25	\$7,000	32
E) #8	Street Boxes	10,000	10	\$1,500	6
F) #7	Staff Distribution	5,000	5	\$750	3
G) #6	Local Computer Store	2,000	2	\$300	1.5
H) #5	Local Bookstore	2,000	2	\$300	1.5
I) #4	Local Grocery Store	2,000	2	\$300	1.5
J) #3	Libraries	2,000	2	\$300	1.5
K) #2	Special Events	6,000	6	\$900	4
L) #1	Phone Brochure Requests	1,000	1	\$150	1
<b>Total</b>		<b>100,000</b>	<b>100</b>	<b>\$22,000</b>	<b>100</b>



## Distribution Tracking Report

WEEK: June 6-13, the Second Week of Registration

CODE	Mon.	Tues.	Wed.	Thurs.	Fri.	Total	
#12	20	12	15	8	5	60	20%
#11	10	7	5	3	2	27	9%
#10	5	4	1	2	2	14	5%
#9	15	10	10	8	5	48	17%
#8	12	12	8	8	2	42	14%
#7	6	4	5	3	1	19	7%
#6	5	4	2	2	0	13	4%
#5	7	2	3	2	1	15	5%
#4	5	6	2	1	0	14	5%
#3	4	4	3	2	1	14	5%
#2	3	1	2	1	1	8	3%
#1	6	4	2	3	3	18	6%
TOTAL	98 34%	70 24%	58 20%	43 15%	23 7%	292	100%

# Model Programmer Course Evaluation Form

Course \_\_\_\_\_ Teacher \_\_\_\_\_

**Programmer Evaluation.** At the conclusion of the above course, the following information should be generated. A copy should be passed on to your supervisor, a copy should be put in the teacher's file and a copy should be put in the course's file.

## A. Student Evaluations

1. Overall, were you satisfied with the course? \_\_\_\_ YES \_\_\_\_ NO
2. Circle your response to the following questions: 1-very poor, 2-needs improvement, 3-okay, 4-good, 5-excellent
  - Understood the subject matter. \_\_\_\_\_ Average
  - Was well prepared for each session. \_\_\_\_\_ Average
  - Made the goals and objectives clear at the beginning of the class. \_\_\_\_\_ Average
  - Stimulated discussion and involvement within group. \_\_\_\_\_ Average
  - Provided individual help when needed. \_\_\_\_\_ Average
3. Comments. On a separate sheet of paper, list key comments on what participants liked about the class and what improvements they would like to see in the class.
4. Testimonials. On a separate sheet of paper, list key testimonials along with the person's name. Make sure to hold their evaluation form on file because it has their signature approving the use of their testimonial.

## B. Teacher Evaluation

1. Overall, were you satisfied with the course? \_\_\_\_ YES \_\_\_\_ NO
2. Fill in your response to the following questions: 1-very poor, 2-needs improvement, 3-okay, 4-good, 5-excellent
  - Was the organization's staff helpful. \_\_\_\_\_
  - Was your room prepared for your class. \_\_\_\_\_
  - Did the learning environment meet your needs. \_\_\_\_\_
  - Did the course description clearly outline your course. \_\_\_\_\_
  - Did your programmer get back to you with course feedback. \_\_\_\_\_

3. Comments. On a separate sheet of paper, list key comments made by the teacher.
4. Testimonials. On a separate sheet of paper, list key testimonials along with the teacher's name.  
Make sure to hold their evaluation form on file because it has their signature approving the use of their testimonial.

#### C. Performance Analysis

1. Price of the Course \_\_\_\_\_
2. Total Registrations \_\_\_\_\_
3. Total Withdrawals \_\_\_\_\_
4. Total Income (after withdrawals) \_\_\_\_\_
5. Total Cost of Promotion \_\_\_\_\_  
 \*If there was additional promotion beyond the catalog listing, attach a copy to this evaluation.  
 \*To figure the promotional cost of a course in a catalog, divide the total cost of the catalog (desktop, printing, mail, etc) by the number of courses.
6. Total Cost of Production (instructor fee, materials, space, etc. ) \_\_\_\_\_
7. Total Direct Costs (5 + 6) \_\_\_\_\_
8. Operating Margin (4 - 5 + 6) \_\_\_\_\_

D. Half-Life: The number of weeks/days prior to the course when 50% of registrations were generated \_\_\_\_\_

E. Participant Analysis Report. On a separate sheet of paper, break down the students' demographics. Age, Sex, Geography, Education Level.

#### F. Programmer Evaluation

1. Overall, were you satisfied with the course. \_\_\_\_\_
2. Rate the teacher on the Likert Scale (1-5). \_\_\_\_\_
3. What action steps would you take to improve this course.

# Promotion Analysis Worksheet

Report Date: 2/20/98

Date Mailed: 12/7, 12/29 & 1/13

A) Promotion	<u>Starting a Home-Based Business</u>
	<u>Boston seminar</u>
B) Printer	<u>TBI Printing</u>
C) Mailer	<u>TBI Printing</u>
D) Price of Item	<u>\$295/\$395/\$495    Average: \$423.28</u>
E) Number of Promos	<u>15,000</u>
F) Costs	
1) Printing	<u>\$2,550.00</u>
2) Mailing	<u>\$780.00</u>
3) Mailing List Rent	<u>\$391.02</u>
4) Postage	<u>\$1,896.10</u>
5) Other	<u></u>
6) Total Cost	<u>\$5,617.12</u>
G) Pieces Mailed	<u>14,670</u>
H) Responses	
1) Number	<u>Week/ 61 Total</u>
2) Dollars	<u>Week/ \$25,820.00 Total</u>
I) Cost per Piece (F6/G)	<u>38 cents</u>
J) Break-even (F6/D)	<u>14</u>
K) Response Rate (H1/G)	<u>.4%</u>

# Promotion Analysis Worksheet

Report Date: 2/20/98

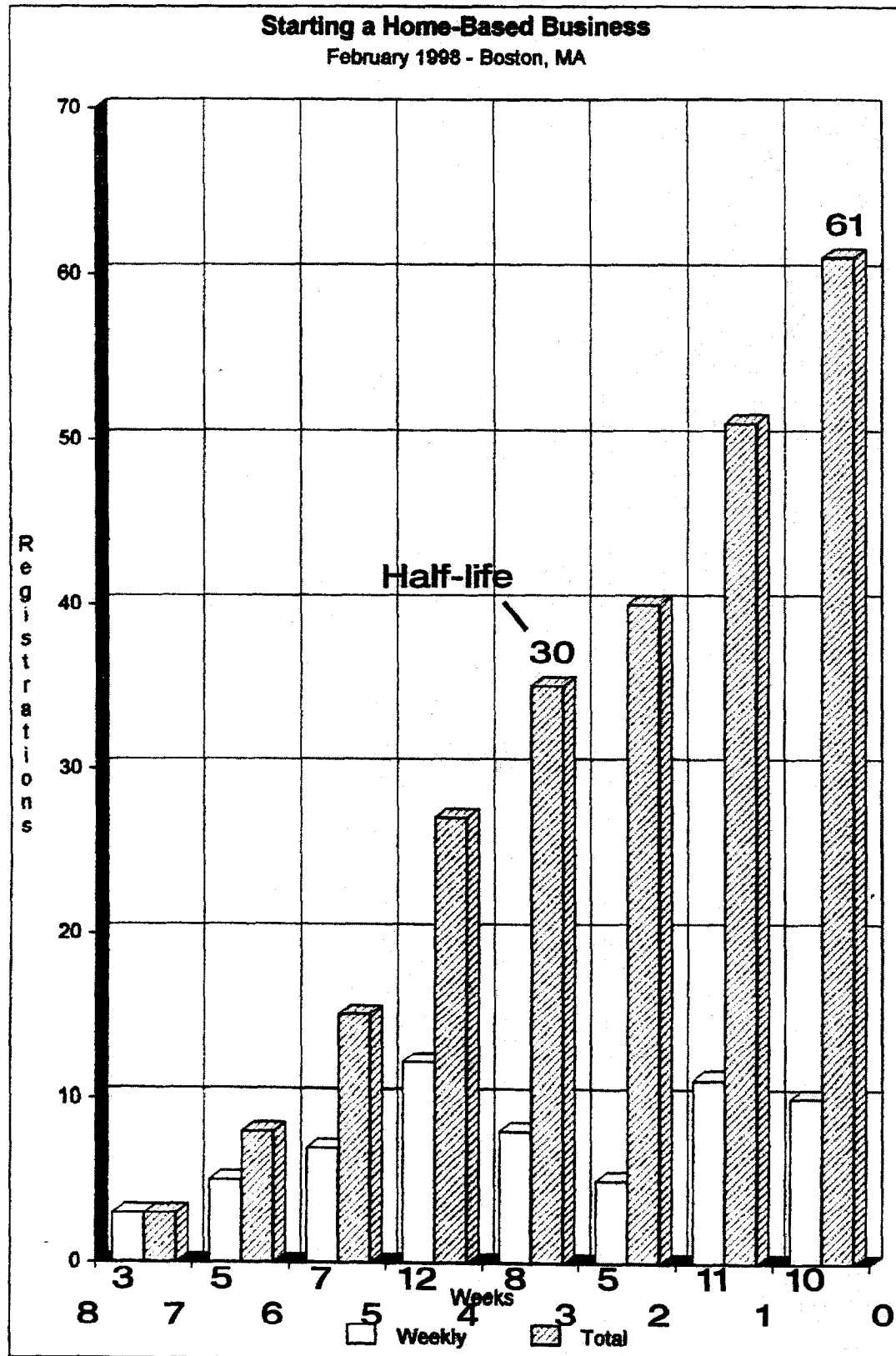
Date Mailed: 12/7, 12/29 & 1/13

A) Promotion	Catalog
	Winter Term
B) Printer	TBI Printing
C) Mailer	TBI Printing
D) Price of Item	\$15-\$125    Average: \$50
E) Number of Promos	65,000
F) Costs	
1) Printing	\$4,500
2) Mailing	\$950
3) Mailing List Rent	\$500
4) Postage	\$2,250
5) Other	\$800 — Distribution
6) Total Cost	\$9,000
G) Pieces Distributed	65,000
H) Responses	
1) Number	1,350 Total
2) Dollars	\$67,500 Total
I) Cost per Piece (F6/G)	14¢
J) Break-even (F6/D)	180
K) Brochure:Participant Ratio	48:1

<b>COST ANALYSIS FORM FOR SEMINARS &amp; CONFERENCES</b>		
<b>EVENT:</b> Starting a Home-Based Business seminar <b>DATE:</b> 2/16 & 2/17, 1998 <b>LOCATION:</b> Boston, Massachusetts <b>PRICE:</b> 1st Person, \$445; 2nd Person, \$395; Average, \$423.28		
<b>Income:</b>	<b>Dollars</b>	<b>Percentage</b>
From Registrations	\$25,820.00	95%
From Publications	\$1,440.00	5%
<b>Total Income</b>	<b>\$27,260.00</b>	<b>100%</b>
<b>Production Costs:</b>	<b>Dollars</b>	<b>Percentage</b>
Presenter Fee	\$1,500.00	6%
Presenter Expenses:		
Travel:	\$791.00	
Hotel:	\$828.73	
Other:	\$259.90	4%
Hotel Expenses:		
Meeting Room:		
Food and Beverage:		
A/V Equipment:		
Other:	\$3,070.39	11%
Miscellaneous Manuals @ \$30 X 61	\$1,830.00	7%
<b>Total Production Costs</b>	<b>\$8,330.02</b>	<b>31%</b>
<b>Promotion Costs:</b>	<b>Dollars</b>	<b>Percentage</b>
Printing and Labeling	\$3,330.00	12%
Rental and Postage	\$2,287.12	8%
<b>Total Promotion Costs</b>	<b>\$5,617.12</b>	<b>20%</b>
<b>Breakeven</b>	33 Registrations	
<b>Summation:</b>	<b>Dollars</b>	<b>Percentage</b>
Total Income	\$27,260.00	100%
Total Costs	\$13,947.14	51%
Net Income on Event	\$13,312.86	49%

<b>COST ANALYSIS FORM FOR COURSE CATALOGS</b>		
<b>EVENT:</b> Winter Catalog		
<b>Income:</b>	<b>Dollars</b>	<b>Percentage</b>
From Registrations	\$67,500.00	95%
From Materials	\$3,500.00	5%
<b>Total Income</b>	<b>\$71,000.00</b>	<b>100%</b>
<b>Production Costs:</b>	<b>Dollars</b>	<b>Percentage</b>
Instructors	\$23,250.00	
Space	\$2,000.00	
Materials	\$1,500.00	
Other	\$3,250.00	
<b>Total Production Costs</b>	<b>\$30,000.00</b>	<b>42%</b>
<b>Promotion Costs:</b>	<b>Dollars</b>	<b>Percentage</b>
Printing and Labeling	\$5,450.00	
Rental and Postage	\$3,550.00	
<b>Total Promotion Costs</b>	<b>\$9,000.00</b>	<b>13%</b>
<b>Summation:</b>	<b>Dollars</b>	<b>Percentage</b>
Total Income	\$71,000.00	100%
Total Costs	\$39,000.00	55%
Net Income	\$32,000.00	45%

# Half-Life Graph





# Gathering and Analyzing End-of-Year Statistics to Help You Plan

1. Income for the year
  2. Registrations for the year
  3. Net or surplus for the year
  4. Total promotion costs for the year
  5. Total production costs for the year
  6. Average participants per class/event
  7. Overall cancellation rate of classes/events
  8. Overall brochure:participant ratio or response rate
  9. Top three performing divisions;  
    worst three performing divisions
  10. Classes/events per person
  11. Average income per person
- 
- Gather the numbers, compare the numbers, ask about the numbers, suggest action

# Next Level and the Ultimate Level of Analysis

- Next Level: By division
  
- Ultimate Level
  1. Total sales by market segment
  2. Average sales per customer
  3. Percentage growth
  4. Market share/market potential
  5. By product
  6. Top customers